https://www.financial-planning.com/news/how-advisors-can-get-noticed-in-a-no-click-search-world

Pt. 1: Get Reviews
Social Proof + Sentiment Signaling
AI models are trained to rely on social credibility heavily, and want to reflect broad consensus from actual humans
This makes reviews incredibly important to have if you want to show up in AI search
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Samantha Russell, chief evangelist of FMG, speaks Sunday, Sept. 7, at Future Proof in Huntington Beach, California.
Rob Burgess/Financial Planning

How advisors can get noticed in a no-click search world
By Rob Burgess
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How does your firm rank on Google? That was the question for years. But in 2025, it may not matter so much when AI-powered summaries replace the need to click on a search result.

Samantha Russell, chief evangelist of FMG, took on that topic in "Will AI Recommend Your Firm? How to Win the New Search Game" at Future Proof in Huntington Beach, California, Monday.

Though SEO has been around for around two decades, it became particularly

important for financial advisors in 2020 when the COVID-19 pandemic lockdown suddenly meant prospects were stuck at home.

Things changed drastically again in May 2024 when Google introduced AI Overviews, meaning that "no-click" search was suddenly the norm.

This means that being at the top of a search isn't enough any longer, said Russell. If a prospect asks ChatGPT a question, advisors must be sure their name comes up in the summarized answer. And the use of ChatGPT and other AI tools is only going to continue to increase.

"When you ask ChatGPT, you tell it everything," she said. "You tell it what you're going through. You tell it your hopes, your dreams, your fears, everything that's going on, and then it validates it for you."

Russell suggested that advisors test these chatbots and AI-powered searches and see where there names come up — if at all.

And if it doesn't? Ask why.

"When I have done so many of these searches, the two things I always ask are, 'Why did you give me the list of businesses that you did?' and, 'Why didn't you include X business?'" she said. "It will tell you what you need to do to be listed in this situation."

The secret to these large language models is that they are highly focused on reviews, said Russell.

"The future is about reviews and social proof and what real people are saying about your business," she said. "If you do not have a plan to get reviews, you need one, like, yesterday. That is the future."

This can mean reviews from more familiar places like Google, but it can also mean other, less common sources like Facebook groups and Reddit, said Russell.

"Reddit is one of the most cited sources on ChatGPT, which is a real problem, and ChatGPT knows that's a problem. But it's how it works right now," she said. "You need people, real people, to be talking about your business, because all of these LLMs see real reviews from real people as a source of truth."

Still, even in the new world of generative AI, old-school SEO practices are still applicable, said Russell.

"It's all about building your reputation through authority and expertise," she said.

All of these AI tools, whether it's Gemini, Perplexity or ChatGPT, want to know, "Do you know what you're talking about, especially in financial services? Are you

going to give advice? Are you the right fit for this particular client with the particular needs that they have?"

"If you want to help business owners in Knoxville, Tennessee, with succession planning and tax strategies, then you'd better have a lot of content around those topics, so that when someone goes to AI and describes themselves with those needs, you are shown as a good fit," she said.

To establish that expertise, Russell recommended writing articles and blog posts that use specific language that prospects might be using themselves in their queries. She recommended keeping a notebook and making a list of questions clients ask in meetings in exactly the language they use.

"Do not change a single word that they ask because that's what they're going to go type into ChatGPT or into a voice search," she said. "They're not going to use your language and make it sound fancy and like a financial professional. They're going to use their own language. You want to write like people talk. Use that conversational language as much as possible."